

ProjectWise Deliverables Management Workflow

NOTE:

Organization = Company registered with Bentley

Transmittal = Data sent outside of organization (Outgoing)

RFI = Request For Information

Submittal = Data received into an organization (Incoming)

Participants = Someone assigned to a project. Can be an internal or external participant

Draft = A partially completed package that can be edited prior to being transmitted

Package = Proposed set of documents being transmitted or submitted

Remember: The sending user issues a **Transmittal**, and the receiving user receives a **Submittal**.

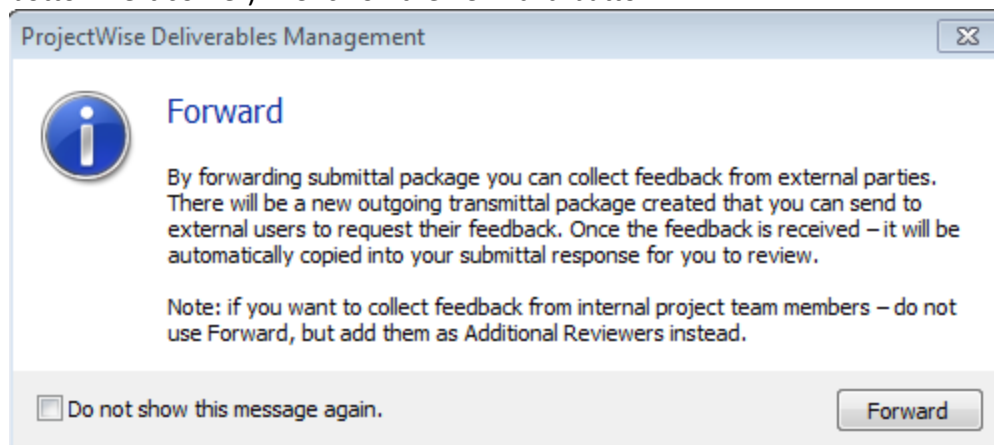
Additional Reviewers – External

Forward for External Review:

The **Forward** feature in PWDM allows the user to forward the existing package for review by an external party. It will create a new outgoing transmittal package that will be sent to the external parties that are selected. However, once responses are received, they will be copied to the original submittal package for review and to be included in your response.

- 1) In the current submittal package, click on the **My Response** tab in the package
- 2) Click the **Forward** button in the bottom right corner

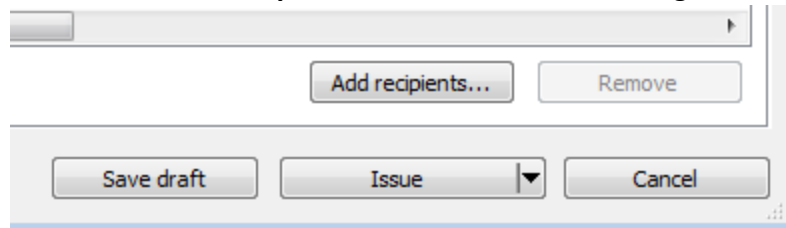
The following message may appear to explain what is happening. You can turn it off from appearing in the future by selecting the **Do not show this message again** checkbox in the bottom left corner) – Click on the **Forward** button.



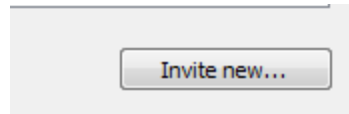
3) In the new transmittal package created, set it up as desired.

- **General Tab:** Information already completed based on original submittal package
- **Recipients Tab**

- o Click on the **Add Recipients** button in the bottom right corner



- o Click the **Invite new** button if the external reviewer is not currently a participant in the project



- o Click on the intended recipient
- o Click on **Select** (They will be added in the bottom window)
- o Click on **OK** and set **Ack/Resp** appropriately

- **Documents Tab**

- o Leave the documents as is to send all documents or use the **Add/Remove** buttons in the bottom right corner to add or remove any documents

- **Scheduling Tab**

- o Set the schedule dates as desired for the response from the external reviewer

- Click on the **Issue** button in the bottom right corner when ready to send to the external reviewer

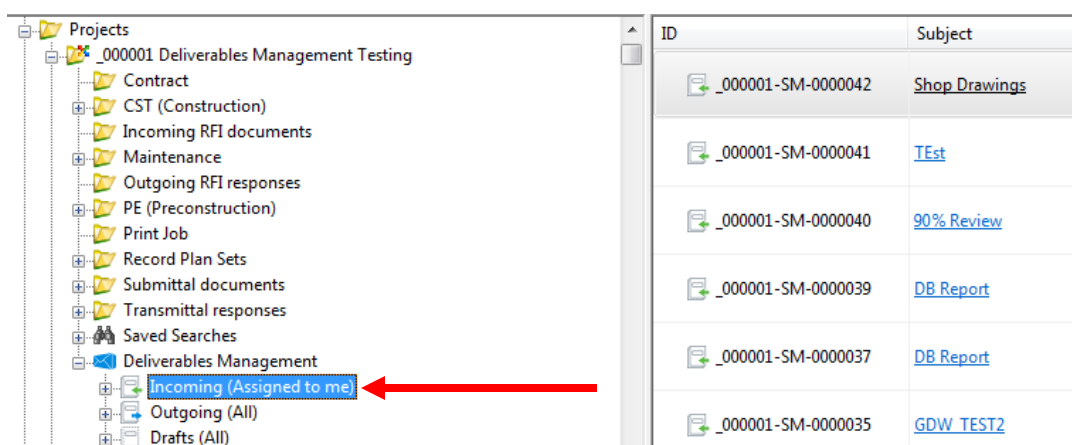
- Review the cover letter and then when ready to send the package for external review, click on **Confirm**

Receive Response from External Review:

You will receive an email for all responses received, both internal and external. To differentiate the two:

- **Email: *All transmittal responses received*** – This is for the external reviewer responses
- **Email: *All additional review responses received*** – This is for any internal reviewers

- 1) Return to the original submittal package
 - a. Use the link from an internal reviewer email, or if no internal review was done, go to the **Incoming** folder (see below) and sort and select the original package by clicking on the link.



- 2) Click on the **My response** tab
- 3) Click on any file in that tab and you will see any internal or external responses from additional reviewers already included in the window under the **My response** tab at the bottom of the window.
- 4) Your response, including any attachments can be added.

Return to the document entitled 2_GDOT_Response to Submittals for continuation of response (Step 10).